

## Section 16 – How to Generate a Report

### **Introduction**

*There are several different types of reports that can be generated from the **Report** menu within JCAVS.*

*The Periodic Reinvestigation report will provide you with a customized printout of everyone that is within your SMO whose investigation is out-of-scope and requires a Periodic Reinvestigation.*

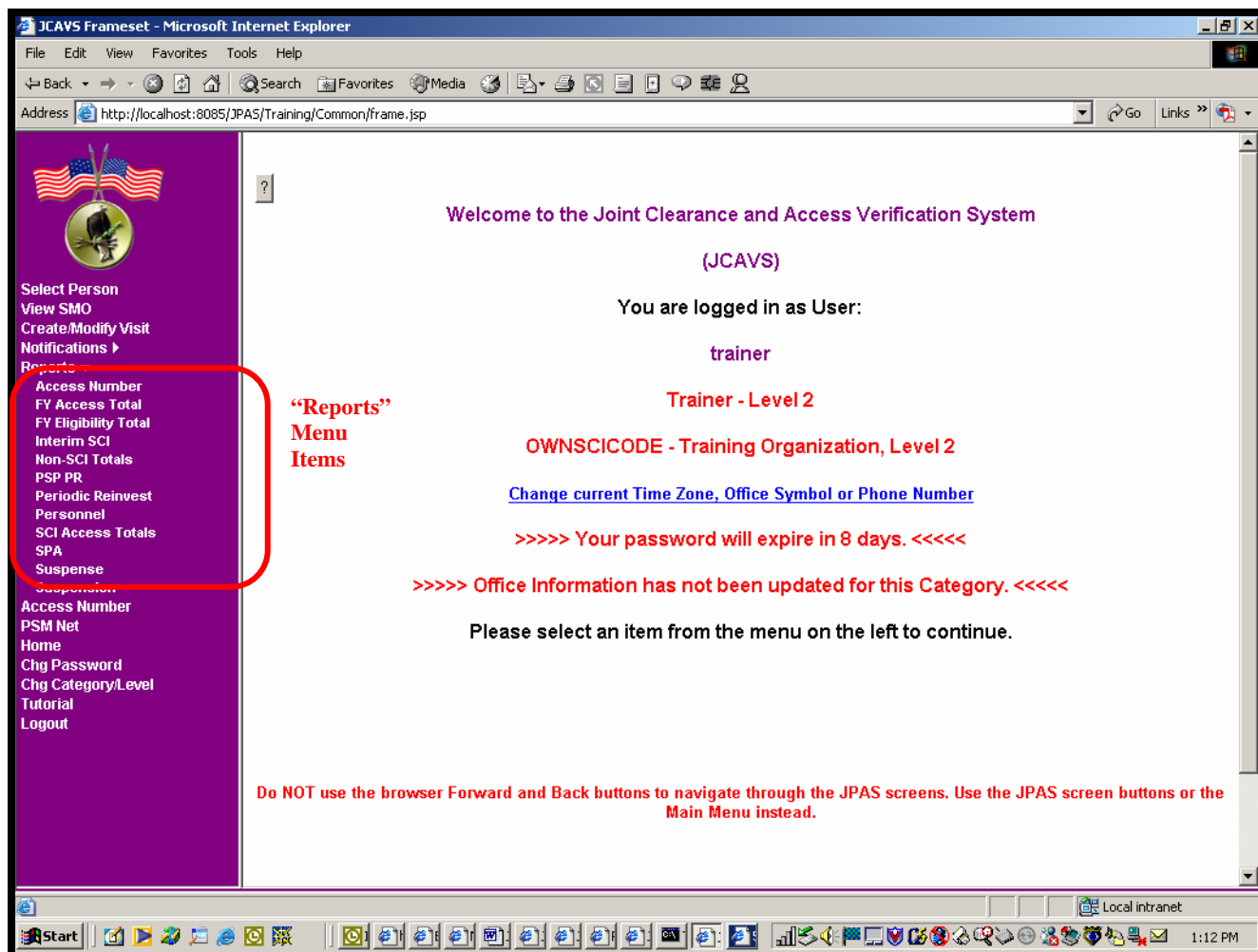
*The Personnel report will provide you with a customized report containing your entire SMO sorted into different sections based on Organizations and the relationship of a person.*

*It is highly recommended that you use Internet Explorer when you want to generate a report. Reports can be produced in PDF or Excel format.*

### **Instructions**

1. Log in as a **User** for the SMO.
2. Click on **Reports** (column on left).
3. The sub-menu items will appear underneath the word **Reports**.

Figure 40: Welcome screen



4. Click in the **Reports** sub-menu, on the type of report you want to generate.
5. A new window will open which will allow you to customize your reports (Figure 41a).

Figure 41a: Personnel by Eligibility and Access Report screen

**Personnel by Eligibility and Access Report**

**\* Report On:**  
☒ My Office Only  
☐ My Office and Immediate Subordinates  
☐ My Office and all Subordinates

**\* For Persons:**  
☐ Owned Only  
☐ Serviced Only  
☒ Owned and Serviced

**\* Organization:**  
☒ All Organizations  
☐ Organization's Service Agency:

**\*Enter Search Criteria (include an \* for wildcarding):**  
Organization Name:   
Organization Location:   
Organization Code:

**\* Eligibility:**

**\* Investigation Type:**

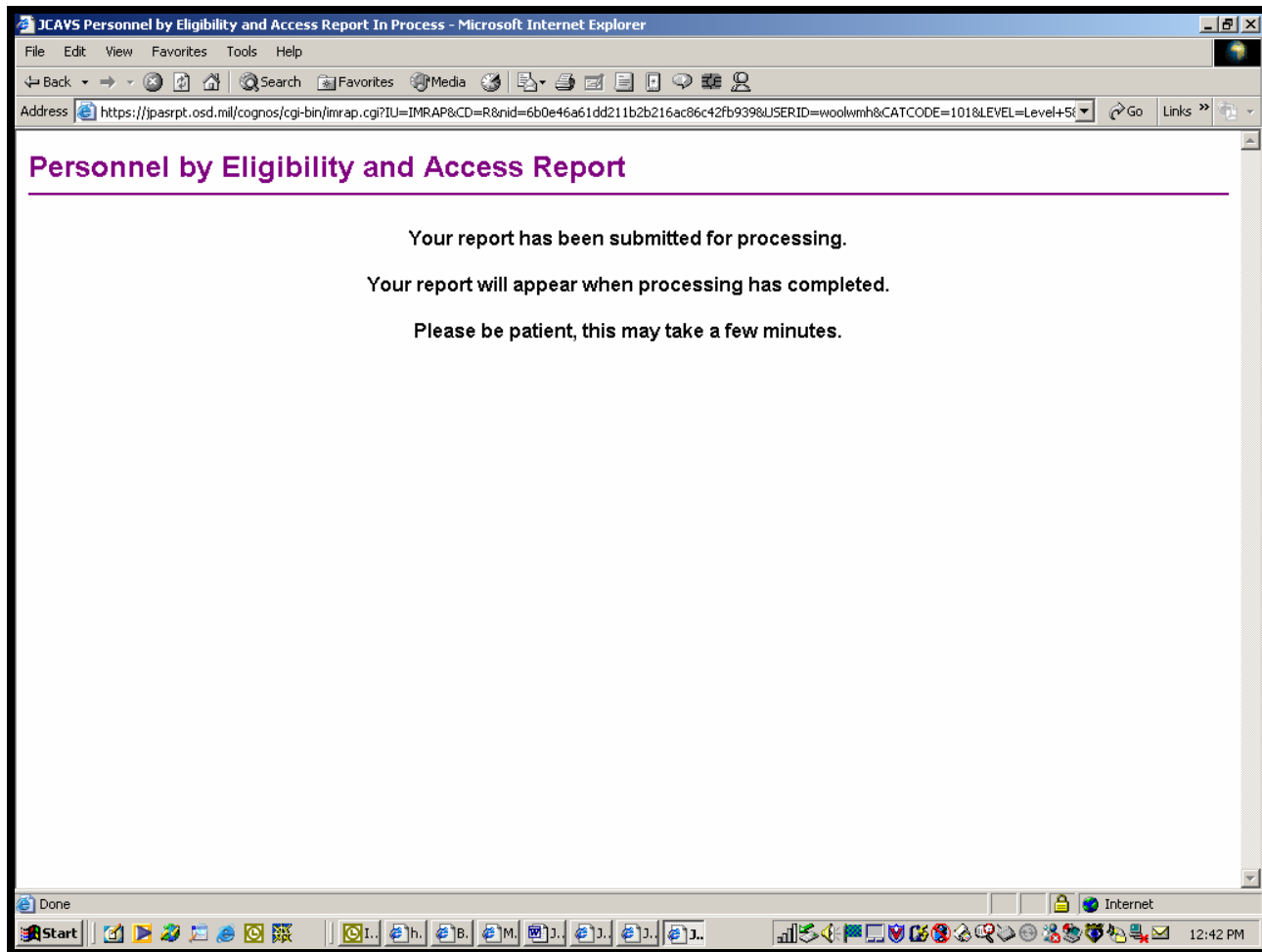
**\* Position Code:**

**\* Position Sensitivity:**

**\* Sort By:**  
☒ Name  
☐ SSN

- Under the **Report On** section, the default is **My Office Only** with two other options concerning subordinates. The options with Subordinates apply only if you have established a “Parent/Child” relationship with other organizations. If you do not have any “Parent/Child” relationships established, use the default setting.
- Under the **For Persons** section, the default is **Owned and Serviced** with two other options. You can either select the report to contain only records on persons with whom you have an “owning” relationship or a “servicing” relationship with the SMO. If you want both, then stay with the default setting.
- There is six other sort filter drop down menus that you **must** populate before running the report. In most cases you will just populate them with **ALL** which is the first option available when you click on the drop down. You can, however, pick any of the other available options if you want to customize your report. If you sort by organization, the sort will be based on organizations in your PSM network.
- Once you have made your choices, click on the gray **Run Report** button.

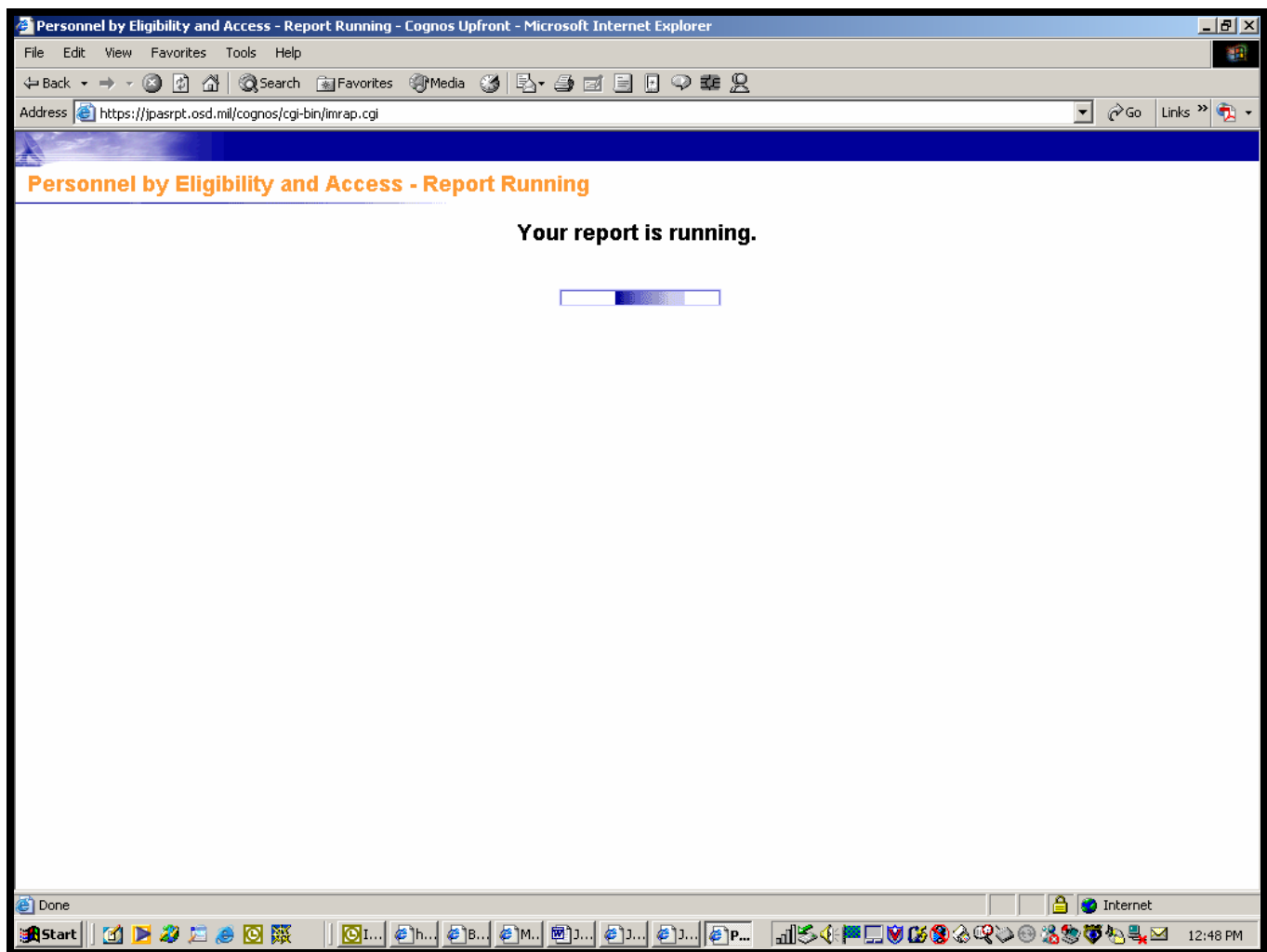
**Figure 41b: Personnel by Eligibility and Access Report screen**



10. You will then see a screen informing you that the report is being processed (Figure 41b). The report will appear once the processing has been completed.

11. While the report is processing, you will see the following screen indicating your report is running.  
(figure 41c)

**Figure 41c: Personnel by Eligibility and Access Report Running screen**



12. After the report has finished processing, you will see the final report sorted according to the SSN of the person contained with each organization.

**NOTE:** On the bottom left of the screen you will see two icons. The icon on the left allows you to view the report as a PDF file. The icon on the right allows you to view the report as an Excel file.